

KINNELOA IRRIGATION DISTRICT
SPECIAL MEETING – BOARD OF DIRECTORS
1999 KINCLAIR DRIVE, PASADENA, CA 91107
WEDNESDAY, OCTOBER 4, 2017
7:30 p.m.

AGENDA

SPECIAL SESSION – OPEN MEETING

1. CALL TO ORDER

- a. Declaration of a quorum
- b. Review of agenda

2. PUBLIC COMMENT – Comments from the public regarding items on the Agenda or other items within the jurisdiction of the District

3. REVIEW OF ORGANIZATIONAL STRUCTURE AND PERSONNEL – Discussion by Personnel Committee and Board of Directors on recommendations for the organizational structure and personnel needed for optimal and cost-effective operation of the District in future years

4. CALENDAR – October 17, 2017
November 21, 2017
December 19, 2017

5. ADJOURNMENT

Each item on the agenda, no matter how described, shall be deemed to include any appropriate motion, whether to adopt a minute motion, resolution, payment of any bill, approval of any matter or action, or any other action. Material related to an item on this agenda submitted after distribution of the agenda packet is available for public review at the District office or online at the District's website www.KinneloalrrigationDistrict.info.



Proposed Staff Management Plan

September 19, 2017

Prepared by Melvin L Matthews, General Manager

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1 INTRODUCTION

1.1 Purpose

During my 2011 performance evaluation, and restated in 2013 and 2015, the **Board of Directors** established a goal to develop a Staff Management Plan for Kinneloa Irrigation District's future. The direction from the **Board** was to start with a "clean sheet of paper" and develop a management plan that would more efficiently meet the objectives of the District while continuing to provide the best service to our customers at the lowest reasonable labor cost. This document describes: the current organizational plan, the problems that I perceive that interfere with my goals and objectives, and a new plan. The reality of the current situation may not permit a complete implementation of my plan, but I was encouraged to think of this as my recommended plan without regard to current job descriptions or existing personnel. At the discretion and recommendation of the **Chair**, previous versions of this plan have not been formally presented to the **Board of Directors**.

1.2 Scope

This Staff Management Plan identifies the positions that I believe are necessary to properly manage the District in future years as well as ensure a successful transition as employees retire, move on to other employment opportunities or are terminated due to performance or other issues.

2 ORGANIZATIONAL CHART

2.1 Current Organization of the District is shown in Appendix A

2.2 Problems with the Current Organizational Structure

2.2.1 Office Staff

When I became **General Manager** in 2004, there were two **Administrative Assistants** in the office, one full-time and one part-time. The full-time person performed most of the customer service and general office functions and the part-time person did the accounting work including accounts payable, accounts receivable and payroll as well as preparing monthly financial reports for the Board. When the part-time person resigned soon after my arrival, I took over all the accounting functions. I made the decision to not refill the part-time position at that time because I wanted to gain direct insight into the financial operations of the District so I could have the opportunity to improve the financial results. I felt that I had a unique opportunity to achieve better results given my educational and operational background in financial management. The District did not previously have general managers with a management background. All previous general managers had moved up from a field operations background.

The original plan in 2004 was to train the full-time administrative assistant to take over most of the routine accounting work after a transition period. Subsequently it became obvious that the required time to do additional tasks and the needed skill set to accomplish this transition made this goal impractical with the remaining administrative staff person. Therefore, in 2012 I refilled the part-time accounting assistant position and subsequently expanded the role of this person to a 35-hour a week **Accounting and Administrative Assistant** to handle the conversion to a new billing system, take over many of the general office and accounting duties and become the primary person to train existing staff members on the new system. This expanded position has also fulfilled my goal of providing for continuity in office and accounting functions during periods of vacation, personal time-off, or absence of administrative staff should someone leave to seek other employment or due to termination or retirement. This expanded position also allows me to fulfill the Board's desire for me to spend more time in the field managing projects and operations staff.

Sadly, the long-time **Administrative Assistant** became ill in November 2016 and passed away in February 2017. Her duties were assumed by the **General Manager** and the **Accounting and Administrative Assistant** for ten months pending hiring a replacement. Subsequently, the **Accounting and Administrative Assistant** was promoted to the position of **Office Manager** to reflect her current expanded role.

2.2.2 Field Staff

The current organizational structure of the field staff creates conflicts with the authority and responsibilities assigned to the **General Manager** as stated in the District's **Rules and Regulations**. These areas of responsibility include authorization for overtime, decisions for purchasing supplies and equipment, the engagement of maintenance contractors, the scheduling and job assignments for the field staff and the oversight of major capital improvement projects. Furthermore, although the current organizational chart shows the **Facilities Supervisor** reporting to the **General Manager**, functionally he works independently.

The two previous general managers and I have recognized the conflict in these positions based on the job descriptions as well as to the requirements of the **Employee Policies and Procedures** regarding overtime and other issues. Furthermore, the **Rules and Regulations** of the District clearly state that the **General Manager** has the authority and responsibility of managing field operations. The **Facilities Operators** have historically been under the direction of the **Facilities Supervisor** but are also willing to perform tasks when requested by the **General Manager**. This arrangement has worked well but has led to conflict when there is a shortage of time or when the dual authority is confusing to the **Facilities Operators**.

2.3 Proposed Organizational Chart is shown in Appendix B

2.4 Features of the Proposed Organizational Structure

The proposed organizational structure places all the **Facilities Operators** and other field personnel directly under the **General Manager's** supervision. The **General Manager** would take the principal role in managing the day-to-day field operations, purchasing maintenance supplies, arranging for construction and maintenance contractors and continue being the Project Manager on major improvement projects.

The proposed organizational structure also includes the addition of a **Facilities Maintenance Worker** to replace the current contractors for landscape maintenance and general building and facility maintenance. Funding for this position will be covered by eliminating our current contractors for this type of work. We previously had an employee for many years doing the landscape maintenance. Having a direct employee once again will allow us to have greater control of the necessary work and expand that position for other maintenance work such as painting, general cleanup and janitorial services.

For me to take a greater role in field operations, I will be relying on the **Office Manager** to provide the primary management of the office, accounting and customer service functions. The **Administrative Assistant** will be trained to handle all customer service and general office functions.

The descriptions of all positions are contained in Section 3.

2.5 Facilities Operators Work Schedule

To eliminate non-emergency overtime, the work week for the **Facilities Operators** could either be: staggered so that weekend and holiday work if needed is covered at the regular hourly rate; reduced when not needed; or eliminated entirely except for emergency response. The replacement of the current part-time facilities operator with a full-time employee is intended to allow complete elimination of non-emergency overtime pay and give the **General Manager** time to adequately perform the expanded field management role. However, the **General Manager** will continue to perform standby duty as necessary to cover vacations and other employee time-off situations where other operators are not available.

It has been my observation that field personnel have not always been used effectively to complete a long list of routine maintenance items that are frequently postponed or shifted to contractors. One of the principal justifications of investing in the SCADA system was to free up personnel for these types of maintenance projects by eliminating or reducing the scope of the daily facility check which typically takes over three hours if all facilities are visited. The hiring of a **Facilities Maintenance Worker** to do the work currently done by contractors

to maintain our facilities and landscaping will also free up the **Facilities Operators** to do the work that requires greater skills.

2.6 Other Financial Considerations

I expect that the new organizational structure of the field staff and the elimination of non-emergency overtime would have a very minor impact on the maintenance and operations labor expense especially considering that there will be a reduction in contract labor for tasks that can now be done by **Facilities Operators** and the **Facilities Maintenance Worker**.

3 JOB POSITIONS AND RESPONSIBILITIES

3.1 General Manager

3.1.1 General Job Description & Qualifications

- 3.1.1.1 Position requires the ability to directly interact on a continuing basis with an elected five-member **Board of Directors** that sets general policy for the Kinneloa Irrigation District (District or KID).
- 3.1.1.2 Position requires a minimum of 5 years of progressively increasing experience in all aspects of water company operations, management and administration. Previous experience in engineering, field maintenance, supervision, construction and project management is desirable.
- 3.1.1.3 Position requires an educational background consisting of a minimum of a high school diploma. A college degree or certification in engineering, accounting, business or management is preferred. A Master of Business Administration degree is desirable.
- 3.1.1.4 Position requires a computer proficiency in word processing, accounting and spreadsheets. Information technology experience with computer hardware and software is desirable.
- 3.1.1.5 Position requires excellent written and oral communication skills coupled with a strong customer-service orientation.
- 3.1.1.6 Position requires that the holder possess or actively pursues a Water Treatment Operators License and a Distribution Operators License issued by the Drinking Water Division of the State Water Resources Control Board. The desired level of certification is T2, D3 or higher.
- 3.1.1.7 Position requires that the holder possess a valid California driver's license.

3.1.2 Administrative Responsibilities

- 3.1.2.1 Interface with the **Board of Directors** on all significant questions related to KID policy issues. Formulate new policy for the District in collaboration with the **Board of Directors**. This policy might relate to future goals, objectives, operational and/or facility improvements and the associated planning and public relations issues.

- 3.1.2.2 Interface with the public regarding questions, complaints, district-related problems, and general dissemination of information, in a "Public Relations" capacity. Interface with the **Board of Directors** on all significant public relations issues.
- 3.1.2.3 Assure that all required materials for monthly **Board of Directors** meetings are prepared. Interface with the **Board Chair** and **Board Members** regarding pertinent issues to be discussed at the monthly meetings. Recommend/advise Board members of the need for Special Board Meetings, as appropriate, when special issues arise. Attend all KID Board Meetings as an interactive participant.
- 3.1.2.4 Participate with the **Board of Directors** on yearly budget planning, preparation, and tracking.
- 3.1.2.5 Prepare a monthly and yearly summary, for the **Board of Directors**, of all significant operations in the District. This would include, but not be limited to:
 - 3.1.2.6 Financial statements and budget compliance
 - 3.1.2.7 Major maintenance operations
 - 3.1.2.8 Capital improvement projects
 - 3.1.2.9 Water production, sales and quality
 - 3.1.2.10 Legal issues associated with the District

3.1.3 Managerial Responsibilities

- 3.1.3.1 Provide overall management at both the administrative and operations levels in the day-to-day operations of the District. Set field-work priorities and personnel scheduling. Oversee performance and scheduling of all construction and engineering-related contracts active in the District.
- 3.1.3.2 Assure that KID policy is followed in the day-to-day operations of the District.
- 3.1.3.3 Provide overall financial management for the District. This includes overseeing customer billing, collections and accounts payable and receivable. Investigate alternative sources of income for the District, such as water leasing outside of the District, available State and Federal funding and related grants.
- 3.1.3.4 Assure that the District operations follow all governmental regulatory requirements. Provide the single contact point between the District and all other pertinent agencies.
- 3.1.3.5 Prepare all required reports related to District operations as necessary.
- 3.1.3.6 Prepare job descriptions for all employees.
- 3.1.3.7 Assume responsibility for all personnel issues including recruiting, hiring, promotion, discipline and termination of all District staff members. When requested, participate with the **Board of Directors** or a Personnel Committee on personnel issues and keep the Board informed about extraordinary personnel activities. Conduct periodic performance evaluations of District staff members and determine the amount of any merit increases or changes in compensation consistent with the

budget as approved by the **Board of Directors**. Participate in the Board's performance evaluation of the **General Manager**.

3.1.4 Office and Customer Service Responsibilities

- 3.1.4.1 Provide control and supervision of all supporting functions including accounting, purchasing, billing and customer service.
- 3.1.4.2 Supervise office employees and delegate responsibilities as appropriate to the task.
- 3.1.4.3 Carry out the District's *Rules and Regulations* regarding customer service.

3.1.5 Field Responsibilities

- 3.1.5.1 Assume complete responsibility for the District's water system and its facilities including construction, operation and maintenance.
- 3.1.5.2 Assume complete charge and supervision of the field employees including programs relating to the safety of District employees and the health and safety of customers.
- 3.1.5.3 Carry out the Board's direction regarding field operations in accordance with District policies and procedures.
- 3.1.5.4 Provide the Board with current information on general operational matters as well as on any extraordinary occurrences with respect to operations.
- 3.1.5.5 Manage capital improvement projects including supervision and inspection. When possible, or required, participate in the normal field maintenance requirements of the District.
- 3.1.5.6 Participate in standby schedule or field maintenance as needed to cover Operators' absences due to vacation or personal time off.

3.1.6 Examples of Duties

The duties listed below are intended only as illustrations of the various types of work that may be performed.

- 3.1.6.1 Interface with five-member elected **Board of Directors** regarding District policy on future goals, objectives, operation and Facility improvements and the associated planning and public relations issues.
- 3.1.6.2 Assure that all required materials for **Board of Directors** meetings are prepared and posted.
- 3.1.6.3 Attend regular and special board meetings as an interactive participant and provide financial and operational reports and other information for discussion and action.
- 3.1.6.4 Interface with the public regarding questions, complaints, District-related concerns and general dissemination of information at in-person meetings, via the District's web site, newsletters and correspondence.

- 3.1.6.5 Serve as webmaster for the District's Internet site including design and updates.
- 3.1.6.6 Prepare annual budget and participate with the **Board of Directors** on planning and tracking.
- 3.1.6.7 Prepare an annual report for the **Board of Directors** and the public on the operations of the District in the past year including water production, sales, and other significant issues.
- 3.1.6.8 Provide overall management at both the administrative and operations level in the day-to-day operations of the District and assure that KID policy is followed.
- 3.1.6.9 Oversee the design, performance, scheduling of all construction projects and engineering-related projects and contracts approved by the **Board of Directors**.
- 3.1.6.10 Manage capital improvement projects including supervision and inspection.
- 3.1.6.11 When required, participate in the normal field maintenance requirements of the District.
- 3.1.6.12 Participate in standby schedule of field maintenance as needed to cover absences due to vacation or personal time off.
- 3.1.6.13 Maintain required certifications through continuing education
- 3.1.6.14 Provide overall financial management for the District including customer billing, collections and accounts payable and receivable. Investigate and facilitate alternative sources of income such as wholesale water sales and appropriate financing and/or grants for capital projects and other activities.
- 3.1.6.15 Participate in the annual audit by providing the requested records and preparing the management and discussion section of the audit report.
- 3.1.6.16 Provide the single contact point between the District and all other agencies and regulatory bodies. Prepare all required reports related to District operations.
- 3.1.6.17 Attend meeting and conferences of water agencies, professional organizations and other groups that are pertinent to District business as well as providing the opportunity to network with other water professionals to gain information and feedback on products, services and trends in the industry. Participate on the boards or committees whenever possible to provide input to further the interests of the District and its customers.
- 3.1.6.18 Participate with the **Board of Directors** or a Personnel Committee on human resource issues when requested. Prepare performance evaluations on staff members under direct supervision and participate in the Board's performance evaluation of the **General Manager**.
- 3.1.6.19 Serve as the District's Information Technology Manager including purchasing and maintenance of computer and related equipment, performing hardware and software installation and updates, and managing the backup of the District's data.

3.2 Office Manager

3.2.1 General Job Description

The **Office Manager**, under supervision by the **General Manager**, provides office administrative and accounting support to the **General Manager** and the **Board of Directors** as well as assisting other employees in all areas of operations, human resources and administration.

3.2.2 Qualifications

Minimum qualifications are graduation from high school plus several years of clerical, customer service, financial record keeping and payroll experience. Position requires that the holder possess a valid California driver's license. Position requires a high level of computer proficiency in word processing, accounting, spreadsheets and customer management systems. Information technology experience with computer hardware and software is desirable. A college degree or certification in engineering, accounting, business or management is preferred. An interest in learning and participating in field operations is desirable.

3.2.3 Required Skills

Position requires a variety of skills to perform routine to difficult clerical work in the preparation and maintenance of financial, accounting and statistical records; requires the use of a computer to prepare, edit and print varied written materials; may be required to transcribe material from voice to text. Employee may be assigned to handle confidential matters and special projects.

3.2.4 Managerial Responsibilities

Managerial functions include supervising the **Administrative Assistant** and providing oversight of the general office functions and records.

3.2.5 Customer Service Responsibilities

Customer service functions include greeting visitors in person and on the telephone, processing mail and email, and performing other regular office functions including filing and ordering office supplies; setting up new accounts, processing customer requests to discontinue water service, answering general customer inquiries; processing payments, preparing bank deposits, processing billing and late charges, following up on delinquent accounts, and maintaining customer service records.

3.2.6 Accounting Responsibilities

Accounting functions include making entries in the District's accounting system, preparing financial reports and reconciling bank statements.

3.2.7 Examples of Duties

The duties listed below are intended only as illustrations of the various types of work that may be performed.

- 3.2.7.1 Adhere to the District's policies and procedures as well as maintain compliance with regulatory and state/federal requirements and the District's contracts and agreements.
- 3.2.7.2 Meet with the **General Manager** to review activities and functions.
- 3.2.7.3 Schedule meetings and maintain calendars for staff.
- 3.2.7.4 Assist in the preparation of agendas and meeting documents for the **Board of Directors**.
- 3.2.7.5 Prepare and submit payroll.
- 3.2.7.6 Prepare monthly water billing.
- 3.2.7.7 Pick up mail and payments from drop boxes and provide various courier functions.
- 3.2.7.8 Enter customer payments, accounts receivable and accounts payable in accounting system and customer information system.
- 3.2.7.9 Print accounts payable checks.
- 3.2.7.10 Prepare and submit water quality and other reports to regulatory agencies.
- 3.2.7.11 Schedule and coordinate customer work orders with field staff.
- 3.2.7.12 Order, maintain inventories, and reconcile purchases of office supplies, materials and special purchases related to department operations.
- 3.2.7.13 Receive telephone calls, take and forward messages, refer callers to appropriate staff, and respond to requests for information and assistance from customers, vendors and regulatory agencies.

3.3 Administrative Assistant

3.3.1 General Job Description

Position requires a variety of general office skills to assist other employees in the preparation and maintenance of customer service, field operations and water quality records; requires the use of a computer to prepare, edit and print varied written materials; may be required to transcribe material from voice to text.

3.3.2 Qualifications

Minimum qualifications are graduation from high school and experience in general office and customer service tasks. Position requires that the holder possess a valid California driver's license. Position requires a high level of computer proficiency in word processing, spreadsheets and customer management systems. Information technology experience with computer hardware and software is desirable. A college degree or certification in accounting or business management is preferred. An interest in learning about the field operations of the district is desirable.

3.3.3 Customer Service Responsibilities

Customer service functions may include greeting visitors in person and on the telephone, processing mail, and performing other regular office functions including filing and ordering office supplies; setting up new accounts, processing customer requests to discontinue water service, answering general customer inquiries; processing payments, preparing bank deposits and following up on delinquent accounts.

3.3.4 Examples of Duties

The duties listed below are intended only as illustrations of the various types of work that may be performed.

- 3.3.4.1 Receive telephone calls, take and forward messages, refer callers to appropriate staff, and respond to requests for information.
- 3.3.4.2 Adhere to the District's policies and procedures as well as maintain compliance with regulatory and state/federal requirements and the District's contracts and agreements.
- 3.3.4.3 Meet with **Office Manager** to review activities and functions.
- 3.3.4.4 Schedule meetings and maintain calendars for staff, help to prepare agendas and meeting documents.
- 3.3.4.5 Order, maintain inventories, and reconcile purchases of office supplies, materials and special purchases related to department operations.
- 3.3.4.6 Perform various duties associated with pickup and delivery of mail to/from various locations and similar courier responsibilities.

3.4 Senior Facilities Operator

3.4.1 General Job Description

Under supervision of the **General Manager**, the **Senior Facilities Operator** monitors and adjusts water supply sources, water treatment, and distribution equipment as needed to deliver safe and reliable water to KID customers.

3.4.2 Qualifications

Minimum qualifications are graduation from high school plus several years of water system field operations, maintenance and/or similar experience. Position requires that the holder possess a valid California driver's license. Position requires that the holder possess or actively pursues a Water Treatment Operators License and a Distribution Operators License issued by the Drinking Water Division of the State Water Resources Control Board. The desired level of certification is T2, D3 or higher. A college degree or certification in engineering, accounting, business or management is preferred.

3.4.3 Desirable Knowledge and Skills

Position requires a variety of knowledge and skills involving electrical and plumbing systems, chlorination systems, SCADA systems, water quality testing, and the maintenance of vehicles, generators and other equipment. Position requires ability to read engineering plans, schematics and system maps and have experience in work place and equipment safety.

3.4.4 Continuing Education

Position requires participation in onsite, online and outside training to maintain certifications and improve knowledge and skills.

3.4.5 Administrative and Supervisory Responsibilities

- 3.4.5.1 Purchase maintenance supplies and equipment under the supervision of the **General Manager**.
- 3.4.5.2 Provide on-the-job training for less-experienced operators and arrange for outside training as needed to maintain certifications and improve knowledge and skills.
- 3.4.5.3 Participate in the design and execution of capital improvement projects and planned maintenance projects under the supervision of the **General Manager**.
- 3.4.5.4 Prepare production and other reports as required.
- 3.4.5.5 Maintain facility and equipment maintenance schedules.

3.4.6 Field Responsibilities

- 3.4.6.1 Perform standard chemical tests, collect samples for laboratory analysis, maintain operating records, and perform routine equipment and vehicle maintenance.
- 3.4.6.2 Install, maintain and repair pumps, valves, mains, services, and related water distribution facility and appurtenances.

- 3.4.6.3 Customer service work includes reading meters, reporting leaks, repairing damage to meters or boxes and making other routine repairs.
- 3.4.6.4 Participate in standby duties and emergency repairs and/or arrange for contractors as needed to accomplish the work.
- 3.4.6.5 Supervise maintenance and repair work performed by field staff and contractors when requested by the **General Manager**.

3.5 Facilities Operator

3.5.1 General Job Description

Under supervision of the **General Manager** and the **Senior Facilities Operator**, the **Facilities Operator** monitors and adjusts water supply sources, water treatment and distribution equipment as needed to deliver safe and reliable water to our customers.

3.5.2 Qualifications

Minimum qualifications are graduation from high school plus several years of water system field maintenance and/or similar experience. Position requires that the holder possess a valid California driver's license. Position requires that the holder possess or actively pursues a Water Treatment Operators License and a Distribution Operators License issued by the Drinking Water Division of the State Water Resources Control Board. The desired level of certification is T2, D3 or higher.

3.5.3 Continuing Education

Position requires participation in onsite, online and outside training to maintain certifications and improve knowledge and skills.

3.5.4 Field Responsibilities

- 3.5.4.1 Perform standard chemical tests, collect samples for laboratory analysis, maintain operating records, and perform routine equipment and vehicle maintenance.
- 3.5.4.2 Install, maintain and repair pumps, valves, mains, services, and related water distribution facility and appurtenances.
- 3.5.4.3 Customer service work includes reading meters, reporting leaks, repairing damage to meters or boxes and making other routine repairs.
- 3.5.4.4 Participate in standby duties and emergency repairs and/or arrange for contractors as needed to accomplish the work.
- 3.5.4.5 Purchase maintenance supplies and equipment under the supervision of the **General Manager** and **Senior Facility Operator**.

3.5.5 Examples of Duties

The duties listed below are intended only as illustrations of the various types of work that may be performed.

- 3.5.5.1 Perform Facility inspection to collect data and confirm proper operation and perform maintenance work as required.
- 3.5.5.2 Take water samples for sources and distribution system.
- 3.5.5.3 Locate water mains and service lines for alerting other utilities with projects.
- 3.5.5.4 Perform work orders for customer service, general maintenance and water leaks.
- 3.5.5.5 Read meters for water billing.

3.5.5.6 Replace meters and meter boxes when required.

3.5.5.7 Maintain inventory of repair parts and supplies and order replacements as needed.

3.5.5.8 Assist contractors with repairs, maintenance and testing.

3.5.5.9 Participate in standby duty.

3.6 Facilities Maintenance Worker

3.6.1 General Job Description

Under the general supervision of the **General Manager**, the **Facilities Maintenance Worker** performs varied unskilled or semi-skilled manual tasks in the office, field, shop or plant to maintain District facilities and landscaping in good condition. The position may include general handyman tasks, landscape maintenance, sprinkler repair, painting and janitorial tasks.

3.6.2 Qualifications

No specific education or work experience is required but it is desirable to have had previous employment in one or more facility and landscape maintenance tasks. Position requires that the holder possess a valid California driver's license. Employee must be in good physical condition and have a willingness to learn new tasks.

3.6.3 Examples of Duties

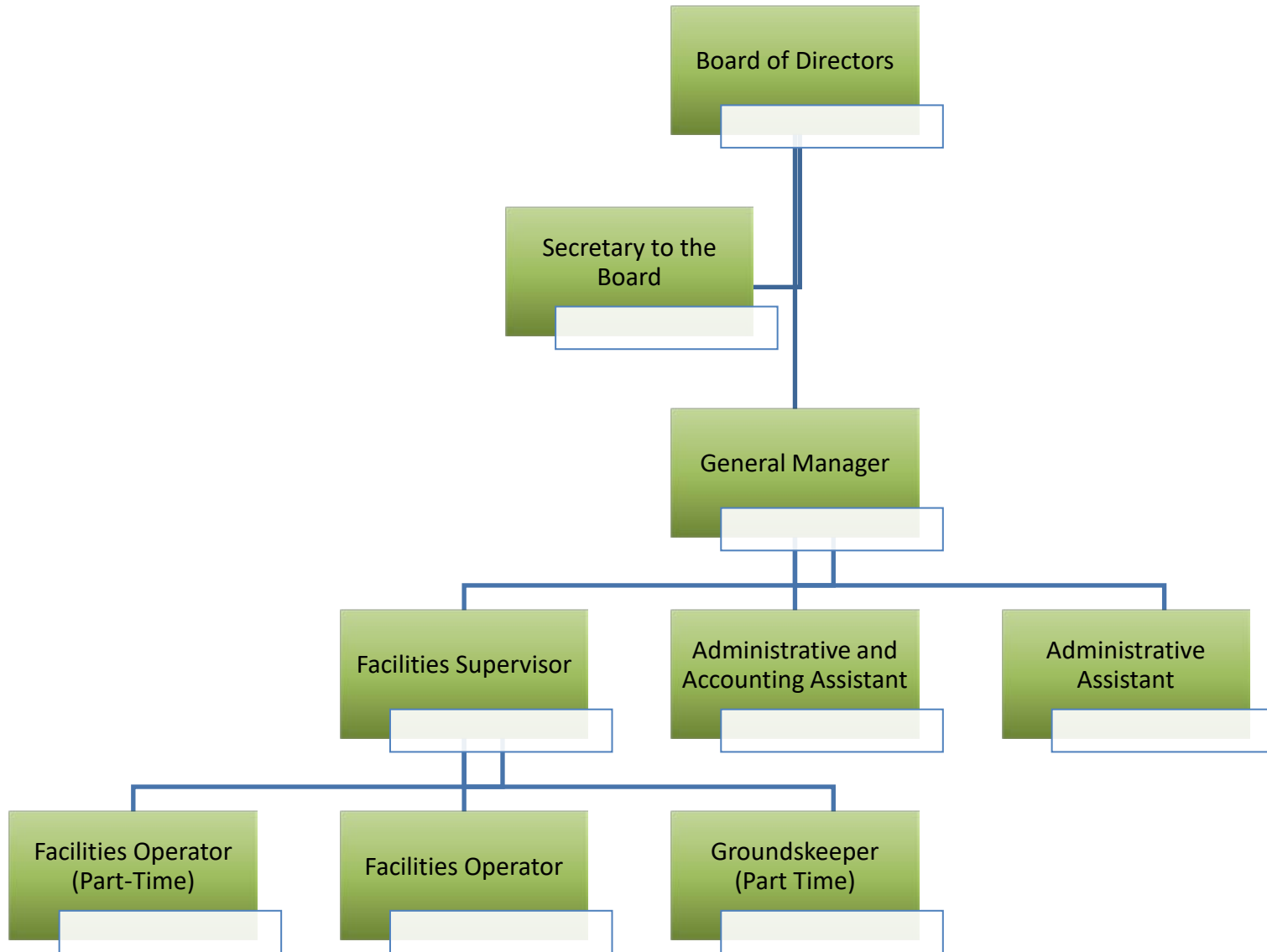
The duties listed below are intended only as illustrations of the various types of work that may be performed.

3.6.3.1 Maintain landscape at the District's facilities

3.6.3.2 Maintain sprinklers and adjust timers as appropriate for the weather conditions

3.6.3.3 Maintain facilities including painting and general handyman and general handyman tasks

APPENDIX A: CURRENT ORGANIZATIONAL CHART



APPENDIX B: PROPOSED ORGANIZATIONAL CHART

